

Change of Status - Probation Completed

- Purpose** Use this procedure to update an employee's status to permanent at the end of a probationary appointment.
- Trigger** Perform this procedure when an employee has completed their probationary appointment.
- Prerequisites** An employee must be in a probationary appointment and successfully completed their probationary period.
- End User Roles** In order to perform this transaction you must be assigned the following role:
Personnel Administration Processor










Change History	
Date	Change Description
7/16/2009	Update to Step 12 to reflect the option of 'Permanent'.

Menu Path Human Resources → Personnel Management → Administration → HR Master Data
→ Personnel Actions

Transaction Code PA40

Helpful Hints	n/a
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The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to validate and proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.

Procedure

1. Start the transaction using the above menu path or transaction code **PA40**.

HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions


Personnel no.

From

Action Type	Personnel	EE group	EE subgr
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			


2. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
From	R	The start date of a record. Example: 05/01/2009
Personnel no.	R	An employee's unique identifying number. Example: 40000493

3. Click  (Enter) to validate the information.
4. Click the box to the left of to select.

HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions




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Personnel no. 40000493
 Name MADDIX ELIZABETH
 PersArea 3026 DSHS Region 6
 PSubarea 00JG Econ/SocSvcsSup
 From 07/01/2009
 EEGroup 0 Permanent
 EESubgroup 01 Monthly(M) OT Exempt Status Active

Personnel Actions

Action Type	Personnel	EE group	EE subgr
Now Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Paid Leave of Absence			

5. Click  (Execute) to execute the action.

Infotype Edit Goto Extras System Help

Copy Actions (0000)

Execute info group Change info group

Pers.No. 40000493

Name MADDOX ELIZABETH

PersArea 3026 DSHS Region 6 EEGroup 0 Permanent

PSubarea 00J6 Econ/SocSvcsSup EESubgroup 01 Monthly(M) OT Exempt Status Active

Start 05/01/2009 to

Personnel action

Action Type UJ Change of Status

Reason for Action 06 Probationary Period Completed

Status

Employment 3 Active

Organizational assignment

Position 70131273 SOCIAL WORKER 4

Personnel area 3026 DSHS Region 6



Employee group 0 Permanent



Employee subgroup 01 Monthly(M) OT Exempt

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
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6. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Reason for Action	R	<p>It stores the reason that an action has been performed.</p> <p> Use the  (matchcode) to open selection list.</p> <p>Example: 06 – Probation Period Completed</p>

7. Click  (Enter) to validate the information.
8. Click  (Save) to save

Infotype Edit Goto Extras System Help

Copy Organizational Assignment (0001)

Org Structure

Personnel No. 40000493 Name MADDIX ELIZABETH

PersArea 3026 DSHS Region 6 EEGroup 0 Permanent

PSubarea 00JG Econ/SocSvcsSup EESubgroup 01 Monthly(M) OT Exempt Status Active

Start 05/01/2009 to 12/31/9999

Enterprise structure

CoCode WA01 STATE OF WASHINGTON

Pers.area 3026 DSHS Region 6 Subarea 00JG Econ/SocSvcsSup

Cost Ctr 3000000000 DEFAULT AGENCY 30 Bus. Area 3000 Dept of Social & Health Serv.

Fund

Personnel structure

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 01 Monthly(M) OT Exempt Contract Permanent

Organizational plan

Percentage 100.00 Assignment

Position 70131273 MX58

Job key 50001036 SOCIAL WORKER 4

351R

SOCIAL WORKER 4

Exempt N

Org. Unit 30012449 CA FO R6

CA FO R6

Org.key S72



Administrator



PersAdmin

Time 09T REG6-VANCOUVER C&FS

PayrAdmin

9. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Reason for Action	R	It stores the reason that an action has been performed.  Use the  (matchcode) to open selection list. Example: 06 – Probation Period Completed

10. Click  (Enter) to validate the information.
11. Click  (Save) to save.

Infotype Edit Goto Extras System Help

Copy Contract Elements (0016)

Personnel No. 40000493 Name MADDIX ELIZABETH

PersArea 3026 DSHS Region 6 EEGroup 0 Permanent

PSubarea 00JG Econ/SocSvcsSup EESubgroup 01 Monthly(M) OT Exempt Status Active

Start 05/01/2009 to 12/31/9999




Contractual regulations


Contract Type 00 Permanent


Periods

Probationary Period 12 Months

12. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Contract Type	R	It defines an employee's State status as either permanent or non-permanent.  Use the  (drop-down) to open selection list. Example: Permanent
Probationary Period	n/a	The length of the employee's probationary, trial service period, etc.  For this procedure, this field is not applicable. Example: 12 Months

13. Click  (Enter) to validate the information.


14. Click  (Save) to save.

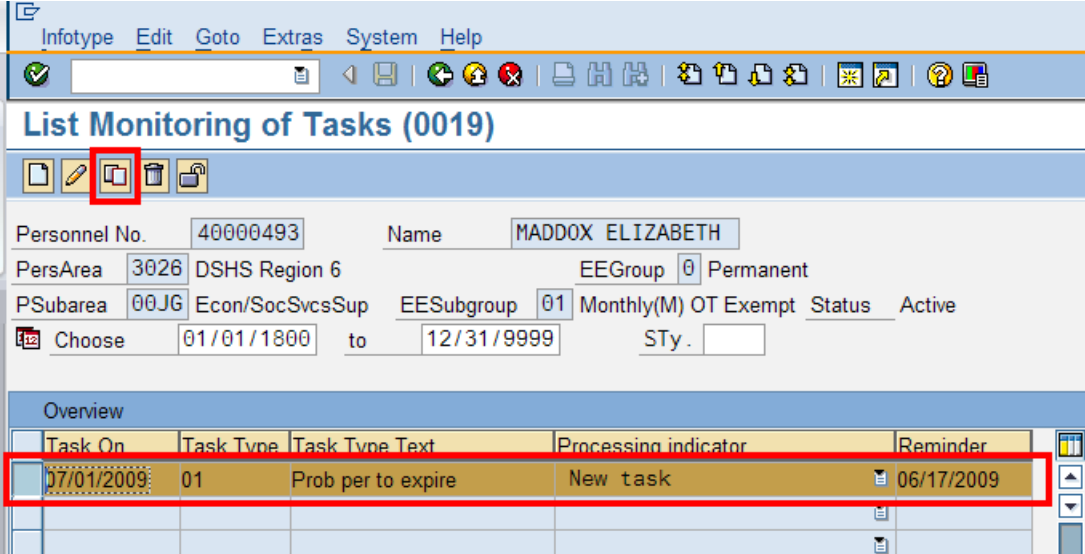
15. Perform one of the following:

IF	Go To
<i>Monitoring of Tasks</i> (0019) exists and will need to be updated,	Step 17
no <i>Monitoring of Tasks</i> (0019) record,	Step 27

16. Access the Maintain HR Master Data Screen, using transaction code **/NPA30**.


17. Click the **Addtl. Personal Data** tab.
18. Click the box to the left of **Monitoring of Tasks** to select.
19. Click **All** to select.

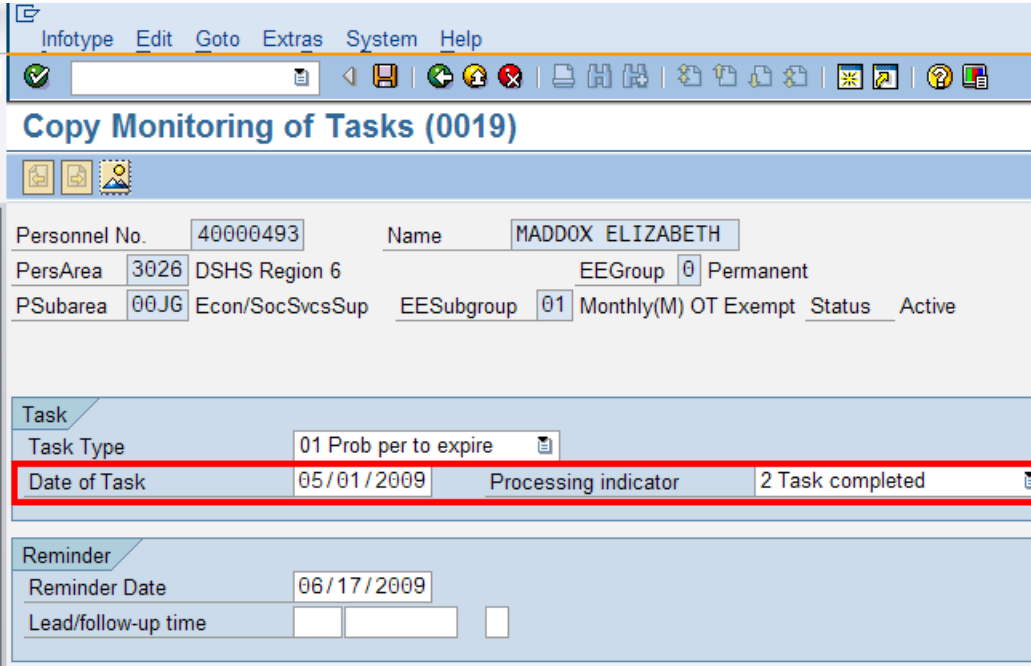
20. Click  (Overview) for an overview of all actions associated with *Monitoring of Tasks* (0019).



Task On	Task Type	Task Type Text	Processing indicator	Reminder
07/01/2009	01	Prob per to expire	New task	06/17/2009

21. Click  to select.

22. Click  (Copy) to copy and continue.





Task
Task Type: 01 Prob per to expire
Date of Task: 05/01/2009
Processing indicator: 2 Task completed

Reminder
Reminder Date: 06/17/2009
Lead/follow-up time:

23. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Date of Task	R	It defines an employee's State status as either permanent or non-permanent. Example: 05/01/2009
Processing indicator	R	This is used to signify if a task entered in the Monitoring of Tasks infotype is new, in process, or completed. Example: Task is Completed

24. Click  (Enter) to validate the information.

25. Click  (Save) to save.

26. You have completed this transaction.

Results
You have updated the employee's state status that has completed their probation period.
Comments
None.